

FEI Connections



President's Letter:

Hello FEI Central Ohio Members and Sponsors:

My letter for this newsletter is going to be longer than usual. I want to cover the topics discussed at our January 2025 meeting – the State of Our Chapter and Plans for 2025+. It has been many years since we've had this sort of open discussion about current state and future plans. For those that couldn't be there, you missed a lively discussion about how our chapter is doing and where we'd like to take it throughout this year and beyond. I will reference here some of the slides we shared at the meeting.

The key points discussed include ...

1. The state of our chapter is GOOD!

It feels very presidential to use those words. But when do they ever say the state of our chapter/union is poor? Anyway, in this case it's 100% true. In 2025 FEI is rolling out a chapter scorecard process, and we showed where we stand against those items, with the headline being that we're in great shape.

Chapter Operating Framework Compliance

- ✓ Board
- ✓ Leadership Participation
- ✓ Programming
- ✓ Member Communications
- ✓ FEI Website
- ✓ Reporting Submissions
- ✓ Governance
- ✓ Financials
- ✓ Chapter Operations
- ✓ Legal
- ✓ FEI Branding

2. We have great Sponsors and long standing Members who are integral to the chapter's health and success.

Thank You to Our Chapter Sponsors!



We are proudly sponsored by blue chip firms serving the local market with extensive networks and deep expertise.

	Firm	Industry	Sponsor Since
	Crowe LLP	Accounting & Tax	2005 ... 20 years!
	Everhart Advisors	Retirement Benefits	2005 ... 20 years!
	Hylant Group	Business Insurance	2005 ... 20 years!
	Robert Half	Talent Placement Services	2005 ... 20 years!
	IceMiller	Legal Counsel	2020
	Footprint Capital	Investment Banking	2023
	Huntington Bank	Banking	2011 – 2014, 2024+
	Focus CFO	Fractional CFOs	2024

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Thanks Also To Our Long-Standing Members!




Member	Position	Since	Years
Charles Driscoll	Treasurer, Edwards Companies	1980	45
Mark Bunner	CFO, Stanley Steamer	1985	40
Rich Martorano	Principal, FocusCFO	1998	27
Jeffrey Fries	CFO, George J. Igel & Co.	1999	26
Steven Woellert	CFO, Mid-Ohio Development Corp	2000	25
Rob Mockard	In Transition	2001	24
Steve Markosky	Principal, Partners In Results	2012	13
Scott Doolittle	CFO, Quantum Health	2017	8
Jack Spitzer	Plexus Worldwide	2017	8
Derik Staufenberg	Senior Lecturer Finance, Ohio State University	2018	7
Christopher Watson	Wealth Advisor, One Digital Investment Advisors	2018	7
Larry Walker	VP Commercial Business, Modular Assembly Innovations	2019	6

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- Compared to FEI overall, our chapter has passed through a longish period where previously active members “retired out” of FEI. We also have comparatively fewer Corporate Memberships than FEI overall. See the snapshot of our chapter and the national comparison to the right of it.

Chapter Membership Snapshot



- Chapter active since 1947 ... 75+ years of fulfilling the FEI mission!
- Impressive network of seasoned and well-connected Finance and Operating Executives
 - ✓ CFO's
 - ✓ Controllers
 - ✓ VP's of Finance
 - ✓ CEO's
 - ✓ Operating Executives
- Retired Executives and Consultants
 - ✓ Academics in Finance / Accounting
 - ✓ Entrepreneurs building businesses

Chapter Demographics

Category	Chapter	National
Executive	41%	41%
Retired / Consultant	15%	15%
Entrepreneur	1%	1%
Academic	1%	1%
Corporate	38%	38%

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4. That leaves our chapter membership poised for growth, which has already started. But when comparing ourselves to “neighboring” chapters, the opportunity to grow our chapter significantly becomes clear!

This chapter growth opportunity was the topic for the bulk of the meeting.

Whereas FEI as a whole grew 4% in the most recently published metrics, Central Ohio grew by 8%. That’s great, and came from work by a few to recruit externally, and to “work” their networks. The opportunity for us all if we can grow to the size of neighboring chapters is ... big. Bigger networks, better programming, and more satisfied members and sponsors – a “virtuous circle” benefiting all.

FEI Central Ohio Chapter Metrics



Chapter Operating Framework Compliance

- ✓ Board
- ✓ Leadership Participation
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New for 2025 - Key Metrics Reporting

- Membership Size / Trend
- Retention
- Engagement
- Net Promoter Score (survey)
- Exceptional Events (survey)

The Opportunity – Membership Growth

Neighboring Chapters	Population (2020 M)	% of FEI National Members
Central Ohio	2.138	0.2%
Cincinnati	2.250	1.1%
Cleveland	2.186	0.7%
Dayton	0.814	n/a
Detroit	4.392	17.5%
Fort Wayne	0.448	0.9%
Grand Rapids	1.150	0.3%
Indianapolis	2.090	0.6%
Louisville	1.362	0.5%
Pittsburgh	2.457	0.9%
Toledo	0.606	0.4%


Large Central Ohio Growth Opportunity!

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5. This brings us to our plans for 2025 and beyond, which will be focused on executing on the chapter growth opportunity. We presented 10 action areas the board intends to pursue to continue chapter growth, and to achieve its potential.

How We Contribute to Chapter Success in 2025+



fei
central ohio
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No.	Initiative / Task	Board	Members	Sponsors
1.	Chapter Board: Committees and Succession	X (B)	X	X
2.	Focus on "5 Star" Programming (relevant, exciting, newsworthy)	X (P)		X
3.	Joint meetings with adjacent organizations (Finance, Diversity, Pipeline)	X (P)		
4.	Up our promotional game via social media and/or print/electronic marketing (events, members, sponsors, content, why FEI?)	X (B/A)		
5.	"Bring a Friend(s) / Client(s)" ongoing campaign: 1-2 per meeting	X (M/E)	X	X
6.	Member Recruiting Initiative (LinkedIn)	X (M/E)		
7.	Member Recruiting among "Large Blue Chip" Firms (Individuals or Corporate)	X (M/E)	X	X
8.	Incentives for Joiners/Recommenders (e.g. no local dues year 1)	X (M/E)	X	
9.	Sponsors Gift a Free Membership	X (S)		X
10.	Manage "on deck" sponsors to maintain interest and options	X (S)		

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Notice that the action list includes columns for Board, Members and Sponsors. **Getting from where we are to those larger sizes is something we can all contribute to.** I'll call your attention to just a few of the items:

#5. Bring A Friend(s) / Client(s) ongoing Campaign

When we've grown our membership, it has largely been through personal relationships. Someone invited someone to a meeting, because they thought they could benefit from the networking that FEI offers. Those people agreed ultimately, and signed up. They responded to the friend/colleague, when they maybe also ignored a dozen emails, LinkedIn requests, or unsolicited phone calls about other groups.

If each of us – members and sponsors – committed to bring two (2) people to each meeting, that represents dozens of potential members introduced to the organization per year. It won't be a fit for everyone, we know. But I believe this one item alone could be the single biggest determinant of our success in #growing the chapter to our potential.

#9. Sponsors Gift a Free Membership

As in past years, this year FEI is offering free memberships to be given out by chapter sponsors. What a differentiator for a potential CFO client – not only the services your firm offers, but also a free year of membership to FEI. I encourage all our sponsors to take advantage of this program!

#1. Chapter Board: Committees and Succession

Our chapter board currently has 7 members, who also participate on committees for Programming, Sponsorship, and Membership/Engagement. We are always looking for people to lend energy and expertise to move the organization forward. Want to help? Are you a member who wanted to get the lay of the land upon joining and are ready to pitch in? Are you a Sponsor who thinks you could provide some programming expertise? Raise your hand and get involved!

That's it for now. Our FEI chapter is strong, and the opportunity is crystal clear to make it even stronger by growing to the sizes of neighboring chapters. We ALL can contribute to achieving that larger potential! Thanks for your support and participation so far, and if you are willing / able to provide move, just raise your hand! Onward to a successful 2025!

Regards,
Steve Markosky
+1 (614) 499-0647
Steve.Markosky@PartnersInResults.net

MARK YOUR CALENDARS

Tues January 21, 2025
5:00-7:00 pm
"FEI The State of the Chapter"
Aubergine Dining Club

Wed February 19, 2025
5:30-7:00 pm
One Columbus
"The Columbus Region Economic Update"
Brookside Golf & CC

Tues March 11, 2025
5:00-7:00 pm
X-Golf Columbus

Wed April 16 2025
5:30-7:00 pm
Everhart Advisors
"Basic Wealth Building Concepts"
Everhart Advisors Office

May 18-20, 2025
FEI Financial Summit
Las Vegas

May 2025
TBD

June 2025
Social
Antiques on High

Upcoming Events:

FEI at X-Games Columbus
Tuesday, March 11, 2025 5:00-7:00 pm



Join FEI at X-Golf Columbus and enjoy Jet's Pizza, drinks, golf and networking with your financial peers! Bring your own clubs or rental clubs are available. X-Golf's state of the art indoor golf simulators offers players unparalleled accuracy through camera, lasers, sensors and advanced software. *Golf is not required, but having fun and networking are!

Register at the link below:

[https://lp.constantcontactpages.com/ev/reg/j468qer?mode=preview&source_id=72ae5f72-](https://lp.constantcontactpages.com/ev/reg/j468qer?mode=preview&source_id=72ae5f72-bd10-4ef2-9a7c-9f5c93f82700&source_type=em&c=FEI and Everhart)

[bd10-4ef2-9a7c-9f5c93f82700&source_type=em&c=](https://lp.constantcontactpages.com/ev/reg/j468qer?mode=preview&source_id=72ae5f72-bd10-4ef2-9a7c-9f5c93f82700&source_type=em&c=FEI and Everhart) FEI and Everhart Advisors

"Basic Wealth Building Concepts"
Tuesday, April 16, 2025 5:30-7:00 pm
Everhart Advisors Office



Join FEI and Steve Murlin, Retirement Plan Consultant, Everhart Advisors, as he discusses "Basic Wealth Building Concepts" at their beautiful new office in Dublin. The evening will also include drinks, appetizers and networking. Steve has nearly 40 years of experience in the employer-sponsored retirement plan industry, including investment fiduciary services, participant advisory services, as well as plan design and administration.

Register at the link below:

https://lp.constantcontactpages.com/ev/reg/4jp58y4?mode=preview&source_id=52a857b3-2804-441b-bb8d-8cdf26987fd5&source_type=em&c=

**BOARD OF
DIRECTORS
2024-2025**

Steve Markosky,
Chapter President
Principal,
Partners in Results

Bob Brewster,
Chapter Membership
Director
Managing Partner,
Hylant

Rich Martorano,
Chapter Treasurer
FocusCFO

Brandy Raabe
Chapter Membership
Committee
Controller,
Ohio Education
Association

Mike Sedlock,
Chapter Program
Committee
VP of Finance,
Avaap

Upcoming Events Continued:**May FEI Program
TBD****FEI Financial Leadership Summit
May 18-20, 2025
JW Marriott Las Vegas Resort and Spa**

Revolutionize your financial leadership at FEI's 2025 Financial Leadership Summit, where cutting-edge AI insights meet actionable risk management strategies. Hosted at the luxurious JW Marriott Las Vegas Resort and Spa, this multi-day experience will empower you to drive innovation, mitigate risks, and stay ahead in an ever-changing financial landscape.

Register at the link below:

<https://www.financialexecutives.org/Events/Conferences/2025-Financial-Leadership-Summit/Info/Register.aspx>

**FEI Social
June Date TBD
Antiques on High**

**BOARD OF
DIRECTORS
2024-2025
Continued**

Derik Staufenberg,
Chapter Academic
Director
Finance Professor,
The Ohio State
University

Analisa Trares,
Chapter Administrator
Office Manager,
Lazear Capital
Partners

Larry Walker,
Chapter Sponsorship
Director
Vice President,
Commercial Business,
Modular Assembly
Innovations

Upcoming Webinars:

February 25, 2025 2:00-3:00 pm Eastern Time

“The State of Corporate Travel & Expense”

<https://www.financialexecutives.org/Events/Webinar/The-State-of-Corporate-Travel-and-Expense-Navan.aspx>

February 27, 2025 2:00-3:00 pm Eastern Time

“The Road to Ringing the Bell: Compliance and the IPO Journey”

https://get.floqast.com/pre-ipo-compliance-webinar?utm_source=fei&utm_medium=content-syndication&utm_campaign=fei-webinar-promotion-pre-ipo-compliance-webinar

March 12, 2025 2:00-3:00 pm Eastern Time

“A CFO’s Guide to Mitigate the Madness”

<https://www.futureviewsystems.com/resources/cfos-guide-to-mitigate-the-madness>

March 18, 2025 11:30 am Eastern Time

“Q1 2025 Quarterly Recap”

<https://kpmg.com/us/en/frv/webcast/q1-2025-quarterly-outlook-webcast.html>

March 19, 2025 11:00 am Eastern Time

“The State of the Accounting Profession”

<https://www.financialexecutives.org/Events/Webinar/The-State-of-the-Accounting-Profession-CoStar.aspx>

March 19, 2025 1:00 pm Eastern Time

“Five Key Trends Redefining Finance and Accounting in 2025”

<https://www.financialexecutives.org/Events/Webinar/Five-Key-Trends-Redefining-Finance-and-Accounting.aspx>

**CHAPTER
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Past Events:

**FEI 2024 Election Panel Discussion
Tuesday, October 15, 2024
The Boat House at Confluence Park**



The FEI October event focused on the 2024 Election. There was a lively discussion on some of the issues critical to our businesses and communities. The panel included the following:

Michael B. Coleman, Director of Government Strategies, Ice Miller, Former Columbus Mayor

Adam Miller, Representative, Ohio House, 6th District, Candidate, United States House, 15th District

Besa Sharrah, CEO, Sharrah Group Consulting, Candidate, Ohio Senate, 16th District.

**FEI and Hylant
“Navigating a Cyber Event with Bourbon Tasting to Follow”
Tuesday, November 12, 2024
Hylant Office**

The FEI November event was focused on cyber security and hosted by Hylant, Their cyber team and their security firm, Fortress Security Risk Management, presented followed by a bourbon tasting.

**FEI and ACG
“Holiday Party”
December 5, 2024
Columbus Country Club**



Past Events Continued:

FEI and ACG enjoyed their annual “Holiday Party” at the beautiful Columbus Country Club. There was networking and festive holiday cocktails and appetizers.



Past Events Continued:



Past Events Continued:



Past Events Continued :**FEI and One Columbus
“The Columbus Region Economic Update”
Wednesday, February 21, 2025 5:30-7:00 pm
Brookside Golf and Country Club**

Huntington Bank invited Matthew McCollister, Executive Vice President, One Columbus, to discuss “The Columbus Region Economic Update.” As Executive Vice President, Matt is focused on driving continuous improvement in the organization’s performance and aligning domestic, international, and existing industry outreach strategies. He engages with One Columbus’ network of national site consultants and works closely with their network of local economic development professionals.

The One Columbus mission is to lead a comprehensive regional growth strategy that develops and attracts the world’s most competitive companies, grows a highly adaptive workforce, prepares our communities for the future, and inspires corporate, academic and public innovation in the Columbus Region.

The Columbus Region is a dynamic 11-county metropolitan area in the midst of unprecedented economic growth. The Region is home to today’s leaders and is at the forefront of the industries of tomorrow, from advanced manufacturing to smart mobility research and development. It includes the following counties:

Delaware
Fairfield
Franklin
Knox
Licking
Logan
Madison
Marion
Morrow
Pickaway
Union.

You can read more about One Columbus and The Columbus Region here: <https://columbusregion.com/> .

Thank You to Our Chapter Sponsors!



Join FEI Today!

FEI National Dues Pricing Effective January 1, 2025:

Executive: \$299

Academic: \$299

In Transition: \$299

Military: \$299

Retired: \$299 Life Retired: \$1,500

Central Ohio Chapter Dues:

Executive: \$150

Academic: \$150-In Transition: \$150

Military: \$150

Retired: \$125 Life Retired: \$125

Apply today below:

<https://www.financialexecutives.org/Become-a-Member/Membership-Criteria>

Welcome New 2024-2025 FEI Members:

Ann Beatty, OSU Accounting

Michael DiBlasi, Global Mining Holding

Lauren Hagan, Columbus Metropolitan Library

Jennifer Harris, FST Logistics, Inc.

Jed Harsh, Bread Financial

Deborah Kurtz, Visa

John Moylan, Covetrus

Steve Pierce, CFO Centre

Christopher Ross, Bread Financial

Adam Scott, Decker Construction

Matthew Wroe, TriMas Corporation

Owen Wyss, Miles-McClellan Construction

Corporate Membership Program

The Corporate Membership Program provides each member of your finance staff with membership in both FEI and their local Chapter of choice. If you need assistance, please contact [Member Services](#) at 877.359.1070 or 973.765.1070.

Please review the corporate membership program tiers below:

5-10 Memberships Tier One Corporate Memberships \$3,700

11-20 Memberships Tier Two Corporate Memberships \$6,000

21-30 Memberships Tier Three Corporate Memberships \$10,500

31 Plus Memberships Tier Four Corporate Memberships \$14,500

<https://www.financialexecutives.org/Become-a-Member/Purchase-Corporate-Membership-Program.aspx>

Thank you to our current Corporate Sponsor, Bread Financial!